Managing Short Codes

Overview

Short codes are used for making purchases at U-M, including purchasing animals, equipment and/or other services related to Animal Management protocols, and for assigning daily-care per diem charges. Within the eResearch Animal Management (eRAM) system, Principal Investigators (PI), the Unit for Laboratory Animal Medicine (ULAM), or Short Code Managers designated by the PI can add, remove and edit short codes in eRAM. PIs can also share short codes between protocols and/or with other PIs.

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Adding a New Short Code

When completing any Animal Use Form, only the short codes listed in eRAM that are associated to the specific protocol and that have been activated by ULAM Accounting will be available for use. A Principal Investigator and/or Short Code Manager can add valid short codes to eRAM as necessary. Short codes are added from the Home Workspace.

Home Workspace

1. Click the Manage Short Codes tab.
Home Workspace (continued)

2. Click Update Details.

**Note:** The PI must designate his/her first Short Code Manager. Following that, the designated Short Code Manager has the ability to add others.

Manage Short Code Details page

3. Click Add.

Add Short Code page

4. Type the first few digits of the shortcode in the Select Shortcode field, and then select the desired shortcode from the list of matching values that display.

   **OR**
   
   Click Select and then choose the desired shortcode from the list that displays.

5. Click the appropriate radio button in the Is this short code available for use? field. This setting can be changed at any time.

6. Click the applicable checkbox(es) to Select use type(s).

7. Click Add to enter the protocols for which this short code can be used.
Select One or More Animal Protocol Projects page

8. Click the checkbox(es) next to the applicable protocols.

9. Click OK.

Add Short Code page

10. Click OK.

Manage Short Code Details page

11. Verify the information is correct on the Manage Short Code Details page. Then, click OK.

Notes:

- Short codes can be removed by clicking Delete in the appropriate row.
- To change the details of a short code, click Update in the appropriate row.
- For a short code to be available (i.e. show up in appropriate drop-down lists on Animal Use Forms):
  1) The protocol must be listed on this page;
  2) “Available for Use?” must be “yes” for the short code, and;
  3) It must be flagged as “Active in M-Pathways” by ULAM Accounting. This may take up to a day to process.
Adding a New Short Code Manager

Individuals can be designated as a Short Code Manager for a PI. This allows someone other than the PI to add, update and remove short codes in eRAM that are owned by that PI. The PI must set up her/his first Short Code Manager in eRAM. Additional Short Code Managers can then be added by the PI or by Short Code Managers already designated by the PI.

Home Workspace

1. Click the **Manage Short Codes** tab.

Home Workspace (continued)

2. Click **Update Details**.

Manage Short Code Details page

3. Under **Persons Authorized to Manage Short Codes**, click **Add**.
Select One or More Persons page

4. Check the box(es) next to the individual(s) being added as a Short Code Manager(s).

Note: Use the Filter By options to narrow the list of people when searching for the individual.

5. Click OK.

Manage Short Code Details page

6. Click OK.

Note: If a person should no longer be a Short Code Manager, click Remove in the appropriate row.
**Requesting/Approving/Denying to Share a Short Code**

Requesting a short code involves action by two people – the protocol PI or “requestor” and the owner (must be a PI) of the short code. Only a PI can request to share a short code, and only a PI can give final approval/denial of a short code request. The steps in this section are divided into sections based on your role in the request.

Follow the steps applicable to your role. Short code requests are made from within the protocol for which the short code will be used. Once the short code request is approved, it can only be used on that protocol. To use the short code on a different protocol, a separate request must be made from within the appropriate protocol.

**Note:** Short code requests appear on the **Action Items** tab on your Home Workspace.

### I. Requestor Actions

#### Protocol Workspace

1. Click the **Request to Use Another PI’s Shortcode** Activity.

2. Click **Select...** in the **Principal Investigator** field.
3. Click the radio button next to the Principal Investigator who owns the short code.

**Note:** Use the Filter By options to narrow the list of people when searching for the individual.

4. Click OK.

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5. Enter any comments for the PI in the **Comments** field, if necessary.

6. Check the box to affirm you will use the short code in accordance with the related funding agreement.

7. Click OK.
II. Short Code Owner Actions – Approve/Deny Request

After a short code is requested, the PI listed as the short code owner (and, if applicable, that PI’s designated Short Code Manager(s)) receives an email notification. The request can be accessed either by clicking on the link in the email or going to the Action Items tab on the Home Workspace.

Home Workspace

1. Click the Action Items tab.

Home Workspace (continued)

2. Action Items are assigned an ID number beginning with “ACT.” Click the Action Item’s ID number to open it.
   - If approving a request, complete steps 3-8.
   - If denying a request, skip to step 9.

Action Item Workspace

Approving a Request

3. Click Select Short Code from the Activities menu.

Note: The PI and/or the PI’s Short Code Manager can select a short code.
4. Select the short code being shared with the requestor from the **Select Short Code** drop-down list.

**Note:** The short codes that appear in the drop-down list are those that have been activated by ULAM Accounting.

5. Click **OK**.

6. Click **Affirm Short Code**.

**Note:** Only the PI can affirm the short code to complete the process.

7. Check the box to affirm that the short code may be used by the requestor.

8. Click **OK**.

**Note:** After the PI affirms the short code, it is available for use by the requestor when creating an Animal Use Form from the specified protocol.
Denying a Request

9. Click the **Deny Short Code Request** from the Activities menu.

10. Enter comments for the requesting PI in the **Comments** field.

   **Note:** The **Comments** field is a required field to deny a request and will be included in an email to the requestor.

11. Click **OK**.

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**Requesting a Short Code Transfer**

If a short code used for protocol animal use forms is found to be invalid, or if you would like to switch the short code associated with a particular protocol, a PI or a designated Short Code Manager can request that another approved short code be applied.
1. Click **Short Code Transfer Request** from the Manage Short Codes tab of your Home Workspace.

2. Select the **Short code to be changed** from the list of available short codes. **Note:** Only short codes that are owned by the PI, available for use, and active in M-Pathways will appear in the list.

3. Click **Continue**.

4. Click the appropriate checkbox(es) to select the Protocol(s) for which the new short code is to be applied.

5. Select the **new short code** from the drop-down list.

6. Select the **charge type(s)** for which the new short code may be used.

7. **Enter the billing cycles that this change will affect** in the field provided.

8. Answer the question **Are you requesting a transaction to go back more than (4) billing cycles?**

9. Enter any **Notes to ULAM** in the field provided (optional).

10. Click **Finish**.

An Open Action Item will be created for your short code transfer request and you will be taken to the Open Action Item Workspace. Nothing more is required from the PI/Short Code Manager. ULAM Accounting will verify the Short Code Transfer Request and close the Action Item.